Job Aid 9

Exchange 2000 Installation Checklist

This checklist outlines the steps you should take to install Exchange 2000 onto a server. This checklist assumes all preparatory steps (preparing the Windows 2000 domain and forest, and installing Windows 2000 onto the server in question) have been completed.

Exchange 2000 Installation Checklist: Further Details

As stated above, this document will guide you through the steps necessary to install an Exchange 2000 server into your Exchange 5.5 organization. After the server is installed, it can be used as the receiving server for mailboxes, public folders, or connectors to be moved from other Exchange servers in the organization.

To perform all of these steps successfully, you must log in as the Exchange 2000 Administrator, and must also have Permissions Admin rights to your Exchange 5.5 organization. If the account you are using does not have all of these rights, you may not be successful in installing the server.

Preparing for Possible Installation Issues

Although this server is not already running Exchange 2000, you will want to do a backup if it is running another application. If this server has been built expressly for Exchange 2000, and has no other application software loaded on it, this step is not required.

What you will need

- Preferred Windows 2000 server backup software
- Documented application backup procedure
- Documented Windows 2000 backup procedure

What you should know

- Account name and password that has permissions to backup the server that will be installed

Perform Full System Backup

Completion of this depends on the backup application you are using in your organization. If this is not a new Windows 2000 server, perform a complete application-level backup of any data on the system, then complete a Windows 2000-level backup of the system before proceeding.

Exchange 2000 Server Installation Procedure

What you will need

- Windows 2000 server, running SP1 or greater
- Exchange 2000 installation CD or access to Exchange 2000 installation files from a network location

What you should know

- The name of an Exchange 5.5 SP3 server in the current Exchange organization
- Exchange 5.5 Service Account name and password
- Exchange 2000 Full Administrator account name and password or name and password of an account that has been delegated Exchange 2000 Full Administrator rights and local administrator rights on the server being upgraded

To install Exchange 2000 onto a system that is currently running Windows 2000 Server or Windows 2000 Advanced Server, perform the following steps.

1. Insert CD
2. Run Exchange 2000 Setup
   CD auto launches, close this window. Use a command prompt or double-click Setup.exe in the \Setup\I386 directory of the CD.
3. Opening Wizard Pages
   Click **Next** on the first page, **"I agree …"** on the second, then insert the product ID from the CD case and click **Next** on the third page of the wizard.
4. Exchange 2000 Components or Type of Installation
   From the drop-down list by the **Microsoft Exchange 2000** selection (the top of the page), select **Typical**, **Minimum**, or **Custom** for your installation type. If you select **Custom**, complete the screen by selecting the additional components you wish to install, then selecting the **Install** setting from their drop down.
5. Installation Path
   If you wish to change the default installation point, complete the following steps:
   1. Select the Microsoft Exchange 2000 setting at the top of the wizard
   2. Press the Change Folder button
   3. Type or select the folder you want to install Exchange 2000 into
   4. Press the OK button
   5. If you receive a "This folder does not exist…" dialog box, press the Yes button to have it created
   6. Click Next to continue
6. Licensing Agreement
   Click the **I agree …** setting, then click **Next**.
7. Select a Server in an Existing Exchange Organization
   Type the name of an Exchange 5.5 SP3 server in the existing Exchange site that you wish to join, then click **Next**.
8. Prerequisite Condition Warning
   You will be shown a dialog box saying Exchange Setup will need to test prerequisite conditions. Click **OK**.
9. Downlevel Exchange Service Account Password
   Type the downlevel Exchange Service Account password for the site you are joining, then click **Next**.
10. Component Summary
    Review the Component Summary information, then click **Next** to start the installation process.
11. Installation Complete
    Once the installation is complete, click **Finish** to complete the installation process.

Exchange 2000 Server Post Installation Procedures

Once you have completed your Exchange 2000 installation, you need to backup the server completely to be sure you can recover it in case of system problems.

What you will need

- Preferred Exchange 2000 server backup software
- Preferred application-level backup software
- Preferred Windows 2000 server backup software
- Documented Exchange 2000 backup procedure
- Documented application-level backup procedure
- Documented Windows 2000 backup procedure

What you should know

- Account name and password that has permissions to backup the server that was installed

Perform Full System Backup

Using your documented backup procedures, you will perform an online Exchange backup, then, if the system has another application running on it before you installed Exchange 2000, you will do an application-level backup of the system. You will follow these with a Windows 2000-level backup of the rest of the system. This will allow you to rollback the server to the point immediately before the backup was performed for both Exchange 2000 and any other applications.

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